

TODAY'S MARKET REVIEW

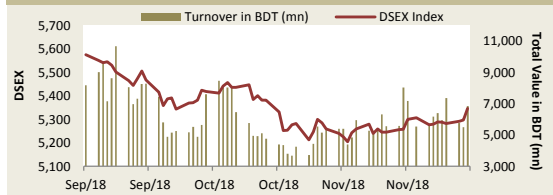
The stock market observed a lively session today amidst enthusiastic participation on bank and financial institution sector stocks. The upward trend in early hour of trading persisted till the closure without any fluctuation. Buoyancy in several large-cap sectors, mostly bank, financial institution, cement, textile and telecom helped the benchmark index to close above psychological 5,300 levels after seven sessions. Some other investors opted to reshuffle their portfolios from tannery, food and fuel & power sectors. Notable price corrections over the last few weeks tempted the bargain hunters to rebalance their portfolios which resulted in 24% rise in market turnover over last session. Gainers took the lead over losers as out of 341 issues traded – 211 advanced, 85 declined and 45 issues remained unchanged in the session. At the days end, the DSEX, DSES and DS30 added 48.88 points, 9.60 points and 14.41 points respectively to their previous day's level.

The major sectors witnessed better performance today. Among the major sectors based on market capitalization – bank (1.4%), financial institution (1.5%) and textile (1.2%) sectors achieved price appreciation while tannery (-0.2%), food (-0.1%) and fuel & power (-0.1%) sectors witnessed price correction in the day's session. The investors' activity was mostly centered on textile (28.3%), pharma (19.0%) and engineering (9.9%) sectors while MLDYEING (3.5%), SQRPHARMA (2.7%) and ADVENT (2.7%) led the scrip wise turnover board today.

The port city bourse, CSE increased by 135.35 points in its broad based index – CASPI.

TODAY'S MARKET SUMMARY

	Today	Yesterday	Change	%
DSEX	5,345	5,297	48.9	0.9%
DS30	1,870	1,856	14.4	0.8%
DSES	1,235	1,225	9.6	0.8%
Market Cap (BDT bn)	3,841	3,818	22.8	0.6%
Turnover (BDT mn)	6,835	5,499	1,336.2	24.3%
Volume (mn)	214	168	46.4	27.7%
No of Issues Advanced	211	176		
No of Issues Declined	85	110		
Issues Unchanged	45	53		
Market Trailing P/E	14.8	14.7		
Market Forward P/E	14.7	14.6		

3-MONTHS MARKET MOVEMENT

UPCOMING DIVIDENDS/ RIGHTS OFFERINGS

Ticker	Record Date	Date of AGM	Declaration
SINOBANGLA	05.12.2018	03.02.2019	10% C
MAKSONSPIN	05.12.2018	06.02.2019	5% C
BATASHOE	11.12.2018	N/A	240% Interim Cash

DSE NEWS IN BRIEF

GLAXOSMITH: The Company has informed that the Board of Directors has been informed vide a notification letter on December 03, 2018 from SETFIRST Limited (Setfirst), a shareholder/member of the Company, that Setfirst has signed a Share Purchase Agreement on December 03, 2018 (the SPA) to sell and dispose 9,875,144 shares in the Company to Unilever N.V. (The Transaction). The transaction is subject to the satisfaction or waiver of the conditions precedents in the SPA (including necessary regulatory formalities and approval in accordance with the laws of Bangladesh).

TODAY'S WORLD STOCK INDICES

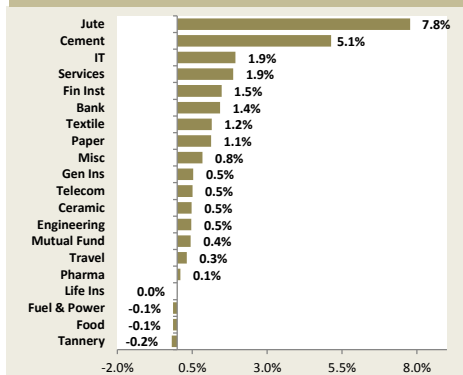
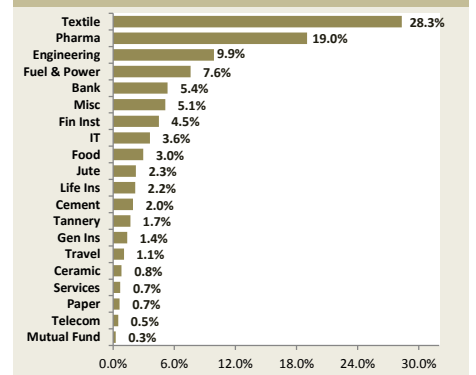
	Value	Change	% Change
DJIA (USA)	25,826.43	287.97	1.13%
FTSE 100 (UK)	7,072.53	10.12	0.14%
SENSEX (India)	36,155.96	-85.04	-0.23%
STI (Singapore)	3,163.94	-26.68	-0.84%
Nikkei 225 (Japan)	22,036.05	-538.71	-2.39%

Website: www.ilslbd.com

E-mail: securities@ilslbd.com

TODAY'S SECTOR MOVEMENT

Sector	Return	Turnover	% Turnover	% of M.Cap	Trailing P/E	Forward P/E	Price/BV
Bank	1.4%	366.7	5.4%	17.4%	8.6	9.9	0.9
Cement	5.1%	134.2	2.0%	3.2%	37.1	39.0	2.8
Ceramic	0.5%	57.8	0.8%	0.9%	24.2	23.0	1.9
Engineering	0.5%	676.9	9.9%	5.8%	16.1	16.0	1.6
Financial Institutions	1.5%	307.4	4.5%	5.8%	13.2	23.7	1.7
Food & Allied	-0.1%	203.5	3.0%	7.9%	25.8	19.1	6.2
Fuel & Power	-0.1%	519.4	7.6%	13.0%	12.7	10.6	1.6
General Insurance	0.5%	94.6	1.4%	1.1%	11.0	11.1	0.8
IT	1.9%	247.2	3.6%	0.5%	24.7	22.6	2.3
Jute	7.8%	154.2	2.3%	0.1%	990.7	201.2	6.0
Life Insurance	0.0%	149.2	2.2%	1.7%	-	-	-
Miscellaneous	0.8%	349.8	5.1%	3.3%	18.4	26.8	1.1
Mutual Fund	0.4%	18.8	0.3%	1.0%	6.9	14.0	15.8
Paper & Printing	1.1%	44.6	0.7%	0.6%	23.7	26.4	1.9
Pharma. & Chemicals	0.1%	1,300.9	19.0%	15.7%	18.8	18.1	2.5
Services & Real Estate	1.9%	49.2	0.7%	0.6%	16.1	13.7	1.1
Tannery	-0.2%	115.9	1.7%	0.9%	18.5	16.3	2.5
Telecommunication	0.5%	35.1	0.5%	15.3%	18.3	14.4	12.8
Textile	1.2%	1,936.4	28.3%	4.7%	19.7	17.0	1.1
Travel & Leisure	0.3%	73.1	1.1%	0.7%	32.4	25.9	0.6

Sector Return

Turnover Distribution

TOP GAINERS

Ticker	Price (BDT)	Change**	Forward P/E*
SONALIANSH	639.7	11.6%	374.1
JUTESPINN	119.0	10.0%	n/a
TUNGHAI	4.5	9.8%	n/a
RNSPIN	9.0	9.8%	11.8
FARCHEM	16.9	9.7%	11.9
ALLTEX	9.2	9.5%	n/a
LHBL	45.2	9.4%	80.7
GOLDENSON	9.4	9.3%	n/a
BDAUTOCA	258.3	8.7%	128.6
PLFSL	5.1	8.5%	n/a

TOP LOSERS

Ticker	Price (BDT)	Change**	Forward P/E*
MONNOSTAF	1,805.8	-5.8%	237.3
VAMLBDMF1	7.0	-5.4%	17.1
SAVAREFR	89.9	-4.9%	n/a
ZEALBANGLA	36.0	-4.5%	n/a
PRIMELIFE	45.1	-4.4%	n/a
SHURWID	29.0	-4.3%	23.4
MLDYEING	52.4	-4.2%	41.4
QUEENSOUTH	44.9	-4.1%	21.6
SAMATALETH	47.6	-3.6%	n/a
INTECH	55.9	-3.6%	18.2

TOP TURNOVER* (BDT mn)

Ticker	Price (BDT)	Turnover	% Turnover
MLDYEING	52.4	239.5	3.5%
SQRPHARMA	259.9	182.6	2.7%
ADVENT	49.8	181.8	2.7%
KPCL	63.1	162.8	2.4%
SAIHAMCOT	27.0	162.0	2.4%
PDL	18.9	149.4	2.2%
SILVAPHL	38.2	147.3	2.2%
UPGDCL	286.0	147.0	2.2%
SIMTEX	34.9	145.0	2.1%
VFSTDL	60.3	144.2	2.1%

TOP MKT CAP (BDT mn)

Ticker	Price (BDT)	M. Cap	% M.Cap
GP	362.4	489,349	14.9%
SQRPHARMA	259.9	205,063	6.2%
BATBC	3,290.3	197,418	6.0%
UPGDCL	286.0	137,019	4.2%
RENATA	1,129.7	90,981	2.8%
BRACBANK	74.7	81,959	2.5%
ICB	114.3	79,744	2.4%
BERGERPBL	1,338.7	62,086	1.9%
LHBL	45.2	52,494	1.6%
OLYMPIC	213.6	42,707	1.3%

Source: DSE, <http://www.dsebd.org>; <http://www.bloomberg.com>; ILSL Research Team

* Based on current outstanding no. of shares; **No. of shares adjusted on record date; *Turnover includes block trade

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